



Integrated Financial Management Program

Core Financial

*Course Name: Customer and Account
Management*

*Module 1: Reimbursable Sales Order
Processing and Recording Statistical Costs*

Course Guide



National Aeronautics and
Space Administration

Introduction

This trainer guide serves as the foundation for delivering training. It provides information for the trainer to share with end-users during the course conduct.

Course Structure

This course covers the basic SAP functionality end-users need to perform specific activities pertaining to their roles. End-users may obtain information beyond this scope outside of class from the On-Line Quick Reference (OLQR) tool or from designated super-users.

End-User Role

An end-user's role in this training session is to:

- Ensure they are comfortable with their new role, SAP concepts, processes and principles presented.
- Ask questions, when clarification is needed.

Complete all activities/exercises.

Trainer Role

A trainer role in this training session is to:

- Provide end-users with the information they will need to learn the new skill set
- Provide end-users with guidance and coaching as they learn the new skills
- Maximize the hands-on practice time
- Ensure the objectives of the module are met
- Answer questions as completely as possible

Module Significance

Successfully creating a Sales Order is vital to the Agency's ability to manage and analyze account receivable activity. Accurately record statistical costs to enable billing for these costs to the customer and also to enable NASA to recover indirect costs incurred in support of reimbursable activity. All statistical costs must be recorded before the billing process can begin.

Module Structure

This module is structured so that the amount of hands-on practice utilizing SAP is maximized. Each of the topics is organized around the following structure:

Content

Lecture material is provided by the trainer on new roles, SAP concepts, processes, and principles.

Content Review

The trainer reviews key topic information at the conclusion of each topic.

Scenario

The trainer provides a description of a typical situation that will be used to practice the business activity within SAP.

Scenario Example: The Reimbursable Manager and the Project Manager have completed the EPR. The WBS structures have been set up and the condition types should be available. The customer order has been received, but the sales order has not yet been created. Verify the WBS structure and derivation rules.

Demonstration

Trainer shows end-users how to perform the business activity in SAP.

Practice

End-users practice the activity in the SAP training database.

Agenda

- Introduction – 0:15 hr
- Background Knowledge – 0:15 hr
- Topic 1: Create and Update a Sales Order – 1:20 hr
 - Activity 1: Verify WBS Structure 0:30 hr
 - Activity 2: Create Sales Order 0:30 hr
 - Activity 3: Update Sales Order 0:20 hr
- Topic 2: Statistical Costs Introduction – 0:20 hr
- Topic 3: Record Statistical Costs – 0:30 hr
 - Activity 1: Record Statistical Costs 0:30 hr
- Course Summary – 0:15 hr